

76 Graphic Arts

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Institute of Paper Science and Technology  
Central File

SURVEY OF  
GROUP ACTIVITIES  
IN THE  
GRAPHIC ARTS INDUSTRY

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September 15, 1936

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## FOREWORD

Recognizing that the roots of this survey are implanted in the National Printing Equipment Association's earlier work which culminated in a plan for a PRINTING RESEARCH FOUNDATION, it has seemed necessary to consider briefly the ramifications of that plan. Surely such a procedure is necessary to describe accurately the boundaries confining the investigation.

If it is the sole purpose of the Committee to discover what cooperative efforts are being expended to promote the sale of printing, then the wisdom of maintaining a special investigator for this purpose may be questioned, since information supplementary to that already assembled, could be obtained in other fashion.

Special effort and expense on this survey can be justified only by the achievement of a broad analysis of the situation, and while it is hoped that the material gathered will answer the specific question on promotional activities, it is further hoped that the survey touches upon other functions sufficiently to justify the manner in which it was conducted.

## INTRODUCTION

The objective of the National Printing Equipment Association, in this instance, is obviously that of increasing the use of all kinds of printing. If this is accomplished it will result in an earlier depreciation of existing equipment and eventually in a demand for new equipment to meet the requirements of a widened market, as well as to replace outmoded or worn facilities.

The equipment industry is only one of several which supply the printing trade. Naturally, therefore, the welfare of certain other industries is involved in any movement which seeks to enlarge the printing field. Most directly concerned are the manufacturers of paper and the makers of printing ink. Recognizing this mutual interest, the National Printing Equipment Association invited paper and ink representatives to consider the merits of a plan for a PRINTING RESEARCH FOUNDATION.

This plan embodies one of several means which might be used to spread the use of printing. Briefly, it is predicated upon the supposition that many potential printing customers either do not fully appreciate the value of advertising, or they lack the creative ability or data necessary to a productive campaign. The Foundation would strive to acquaint such people with the merits of advertising

and would supply them with statistics and creative ideas which they, either because of lethargy or ignorance, are not able to produce. The latter is an important point because it clearly indicates that the Foundation is more than a plan merely "to advertise advertising" or to impress others with the use of printing. In addition to showing the way, it proposes to lend a helping hand in getting there.

The word "research," as used in the title of the Foundation, is limited. It signifies an investigation of market rather than an exploration of product or process. This limitation requires further analysis.

Multiplication of the use of printing, or any product, is dependent upon the continual development of several different functions within the industry. It is manifest that the product must possess a general utility if its use is to be widespread. Moreover, the consumer must be cognizant of such utility, and he is made aware of this fact by various means of promotion. Apparently, the Foundation would endeavor to spread more widely an appreciation of the utility of printing as a function of commerce.

Promotion, however, is only one of the functions of growth. Equally important are well established business practices, equitable prices, intelligent personnel, and continual improvement in product. Some of these functions must be pursued independently by the different concerns; others can be effectively achieved only through cooperative action. In addition to the ordinary trade association activities,

experience has proven that, under the proper conditions, training of man power and scientific investigation of product and process, both of them vital in industry growth, can be effectively pursued through collective action.

Most industries have evolved their manufacturing techniques through a continuous procedure of trial and error. While it is true that they have profitably used the hints which have been dropped to them from time to time by pure science, their research, if any, has generally been of a rather superficial applied nature. They have remained woefully weak on the fundamental scientific principles behind the production process and consequently have generally improved their product in a stumbling and indirect fashion.

There are exceptions to this condition, however, and to name a few examples, the steel industry, the cement industry, and the paper industry have realized how necessary fundamental investigation and knowledge are to their continued progress.

Science in industry demands a properly trained and intelligent type of man power which is familiar with the techniques of the trade, and at the same time, appreciative of the scientific phenomena involved. Until industry possesses a nucleus of highly trained man power capable of recognizing and describing the scientific principles involved in its problems, its progress will continue to be sporadic.

While it is true that the market may be enlarged for most

products by diligent promotion, such as that envisaged by the Foundation, it is equally true that more widespread sales will be accomplished through the development of a more usable and attractive product manufactured under economical conditions, which will result either in a lowered sales price or in better value received at a given price. The latter, of course, is chiefly dependent upon scientific research and intelligent man power. It increases markets through an improvement, a change in the status, of manufacturing conditions. The former increases markets by spreading the use of the product in its present status, as it currently exists. This distinction is an important one in an analysis of the PRINTING RESEARCH FOUNDATION or any plan which is essentially promotional in character.

, Therefore, recognizing the desire of the National Printing Equipment Association for an enlarged printing market and accepting the postulate that, in addition to promotion, industrial growth is dependent upon several other factors, among them invention and research, intelligent man power and established practices, it would seem advisable to discover what action is being taken along these lines by the several branches of the industry.



SURVEY

The identity of the ultimate welfare of all industries is commonly recognized. It is possible, however, to find within this configuration certain industries whose more intimate relationships make this interdependency even more manifest. Certainly, in the production of an article which finds its way into the hands of the consuming public, one may discover any number of participating groups, separate insofar as industry classification is concerned, but mutually dependent for their prosperity upon the sale of the finished product.

Of immediate concern is the graphic arts group comprised of those industries which unite their efforts to create the printed word or picture. It is the purpose of this survey to analyze the activities of the members of this graphic arts group, inspecting not only those contributing to the creation of the printed word, but also those who endeavor to spread its use. Such a definition includes manufacturers of printing equipment, ink manufacturers, paper manufacturers, printers, publishers, advertising agencies, craft organizations, and educational and scientific institutions.

Any attempt to treat the various subjects of this survey in individual fashion would unquestionably result in a heterogeneous array of facts, which could be interpreted correlatively only after laborious effort. Consequently, it has seemed advisable to classify

the data under three functional headings of Trade Associations, Craft or Technical Associations, and Educational or Scientific Institutions.

### TRADE ASSOCIATIONS

The potential functions of an association are manifold. Very likely the activities of any single association do not embrace the whole field. The character of the industry, the disposition of its members, and the availability of finances are limiting factors. Moreover, varying emphasis is placed on these functions within different groups so that, while a mere listing of activities may read the same, in actual practice the results are quite different.

Despite the interdependency of many industries, their respective associations may be expected to pursue activities that are of particular interest only to the immediate membership. Indeed, realizing that the collection of statistics and the dissemination of general information are the most common functions of an association, one would anticipate that, in general, the ramifications of its work would not spread beyond the association membership. This need not be an immutable condition, however, since there are legitimate association functions which might be cooperatively pursued.

For the purpose of this survey, an attempt has been made to list every conceivable association activity. These activities have been assembled in chart form, and the functions of each association are checked under the proper heading. The procedure and the effectiveness of the associations under these different headings will naturally vary. In some instances this variation has no bearing on the present

study; in other instances it may have significance. Therefore, the association activities are listed below in outline form. Wherever necessary, the headings are sub-divided, and in entering the functions of the associations on the chart reference is made to the proper sub-division.

### Outline of Association Activities

#### I. General Information

Clearing house on general inquiries, distribution, reprints, etc.

#### II. Statistics

Production, sales, inventories, deliveries, imports, exports, etc.

#### III. Labor

Employment agency, wages, legislation, industry policy, etc.

#### IV. Public Relations

Legislative analysis

#### V. Trade Customs and Practices

Discounts, differentials, commissions, zones, sales policy, contracts, credits, collections, etc.

#### VI. International Trade

Imports, exports, tariffs, subsidies, currency, etc.

#### VII. Standardization

Units, sizes, quality, testing techniques, etc.

VIII. Accounting

Costs, philosophy, etc.

IX. Research

- A. Product - institution, fellowship
- B. Market - distribution, substitution, trends, etc.
- C. Production - efficiency, equipment, etc.

X. Legal

Advice, copyrights, trade marks, patents, etc.

XI. Educational

- A. Industry
- B. Public
- C. Vocational
- D. Advanced education

XII. Advertising

Collective

XIII. Publication

- A. General information - business conditions, industry problems
- B. Technical
- C. Abstracts
- D. Central library

XIV. Arbitration

Intra-industry disputes, interindustry disputes, etc.

XV. Price Posting

Open price filing

XVI. Safety

Health, accident, sanitation, fire, etc.

XVII. Cooperative buying

XVIII. Production

Amortization of old equipment or plants, operating to demand, etc.

XIX. Insurance

Group insurance, unemployment insurance, etc.

XX. Field Service

Efficiency, accounting, production, etc.

XXI. Taxation

# ASSOCIATION ACTIVITIES

Association	General Information	Statistics	Labor	Trade Customs and Practices	Public Relations	International Trade	Standardization	Accounting	Research	Legal	Educational	Advertising	Publication	Arbitration	Safety	Cooperative Buying	Taxation	Production	Insurance	Field Service	Price Posting
Advertising Typographers of America	x	x	x	x				x	c		a b c	x		x			x				
American Book Sellers Assn.	x			x							a		x			x					
American Newspaper Publishers Assn.	x	x	x	x	x	x	x		a b c	x	a b	x	x				x	y			
American Paper & Pulp Assn.	x	x	x	x		x	x	x	a c	x	a		y	x			x	x			
American Photo Engravers Assn.	x	x		x			x	x		x	a b	x	x								
American Sulphate Pulp & Board Assn.	x	x																		x	
Association of Bank Note Companies	x	x		x					a												
Binders Board Mfrs. Assn.	x	x		x			x		a		a b	x									
Book Manufacturers Institute	x	x		x	x		x	x	b c	x	a b	x		x							

ASSOCIATION ACTIVITIES (cont.)

Association	General Information	Statistics	Labor	Trade Customs and Practices	Public Relations	International Trade	Standardization	Accounting	Research	Legal	Educational	Advertising	Publication	Arbitration	Safety	Cooperative Buying	Taxation	Production	Insurance	Field Service	Price Posting
Book Paper Mfrs. Assn.	x	x		x			x														x
Bristol Board Mfrs. Assn.	x	x		x			x														x
Cardboard Mfrs. Assn.	x	x		x			x														x
Cover Paper Mfrs. Assn.	x	x		x																	x
Glassine & Grease-proof Mfrs. Assn.	x	x		x			x			x		x									x
Groundwood Paper Mfrs. Assn.	x	x		x			x														x
Gummed Industries Assn.	x	x		x	x		x	x	x	x							x	x		y	x
Gummed Label & Embossed Seal Assn.	x	x		x			x	x		x		x					x	x		x	x
International Assn. of Electrotypers & Stereotypers	x	x	x	x			x	x	a		a b	x	x	x				x		x	



ASSOCIATION ACTIVITIES (cont.)

Association	General Information	Statistics	Labor	Trade Customs and Practices	Public Relations	International Trade	Standardization	Accounting	Research	Legal	Educational	Advertising	Publication	Arbitration	Safety	Cooperative Buying	Taxation	Production	Insurance	Field Service	Price Posting
Kraft Paper Assn.	x	x		x																x	
Label Mfrs. National Assn.	x	x		x			x	x		x											
Lithographers National Assn.	x	x	x	x	x	x	x	x	a c	x	a b d e	x	x	x		x	x		x		
National Assn. of Photo-Lithographers	x	x		x				x			a b d e		x								
National Assn. of Printing Ink Makers	x	x	x	x	x		x	x		x				x		x	x				
National Paper Trade Assn.	x	x		x	x		x	x		x										x	
National Publishers Assn.	x		x	x	x	x	x			x		x					x				
National Stationers Assn.	x	x		x	x			x		x	a e		x				x	x		x	
Newspaper Printing Press Builders Assn.	x	x	x	x	x		x	x		x							x				

ASSOCIATION ACTIVITIES (cont.)

Association	General Information	Statistics	Labor	Trade Customs and Practices	Public Relations	International Trade	Standardization	Accounting	Research	Legal	Educational	Advertising	Publication	Arbitration	Safety	Cooperative Buying	Training	Production	Insurance	Field Service	Price Posting
Paper Shipping Sack Mfrs. Assn.	x	x		x							x	x					x				x
Sulphite Paper Mfrs. Assn.	x	x		x			x			x											x
United Typothetae of America	x	x		x	x	x	x	x	(Library)	x	x		x				x	x	x	x	
Water Proof Paper Mfrs. Assn.	x	x		x	x		x	x	x	x							x	x		x	x
Writing Paper Mfrs. Assn.	x	x		x			x					x									x
L: These Associations were not interviewed																					

Having described, in chart form, the extent of the activities of various trade associations affiliated with the graphic arts, the next step is to discuss in more detailed fashion the activities which specifically work toward enlarged markets.

In surveying these activities, it is essential to recognize one very important point, namely the difference between enlarging the proportion of a particular section of the total market and the enlargement of the printing market as such. Just as there are different processes of printing, so are there different types of paper and different media of advertising. These factors are in constant competition, each seeking to outdistance the other, and one would anticipate that, in general, their efforts are dedicated to the advancement of their particular product or process rather than paper or printing as such. It is true that this intra-industry competition has an impact upon the general market, but, nevertheless, there is a distinction between activities seeking to increase the complete market. Not only is this distinction an important one in analyzing the current market activities, but it is highly important in considering the plausibility and workability of a plan to enlarge the total market.

The efforts of individual concerns are disregarded in this survey, and attention is paid only to group activity.

#### THE PAPER INDUSTRY

Nowhere in the paper industry is there group effort to increase the use of printing. Likewise, there is no general promotional activity

to increase the use of paper. There is some effort to impress the consumer with the advantages of a particular kind of paper, but in such instances the problem is approached from a specific market viewpoint.

#### Manufacturers of Paper

In their association activities the manufacturers of pulp and paper are divided into three principal groups. The boundaries of these groups are determined both by physical measurements of the papers and by the markets which they supply. The manufacturers of newsprint form one group, the manufacturers of paper board a second group, while all other papers comprise the third group. It is this third group which is of especial interest to the survey. A description of its association structure follows.

The group is organized as a federation. The American Paper and Pulp Association is the central body and concerns itself with problems of general interest, such as imports and exports, national and state legislation, industry statistics, standardization, accounting, correlation of trade customs, etc. Membership in the American Paper and Pulp Association is comprised of the smaller associations (there is no corporation membership), which represent specific classes of paper, such as writing, book, kraft, groundwood, sulphite wrapping, etc. There are twenty of these affiliated associations. They collect statistics and deal principally with the market structure for their particular papers.

There are virtually no promotional activities in this feder-

ated group. One section of the Writing Paper Manufacturers Association has sought, by means of trademarks and collective advertising, to impress the consumer with the advantages of high quality paper. It plans to extend this program in the near future. In two or three instances, similar but less extensive programs have been followed by other groups. One of the smaller associations has prepared an educational movie describing production methods and demonstrating the uses of its product.

The industry has no official publication aside from the various statistical bulletins and general surveys on economic conditions. Industry news and technical papers are handled by the several independent trade journals published in the paper and pulp field. These are private ventures, separately financed, and have no affiliation with the associations.

The associations do not have training programs. The Institute of Paper Chemistry, which is both an educational and research institution, is not an association function. It is maintained by the various pulp and paper mills as a separate activity, although in certain instances associations have utilized its facilities. The organization of the Institute is discussed under the separate heading of "Education".

The newsprint manufacturers of the United States have done very little as an association since the expiration of the N.R.A. However, the Newsprint Service Bureau, which is supported by Canadian and American manufacturers, is highly active and is presently running a series of educational advertisements in the EDITOR & PUBLISHER.

The standardization of certain grades of paper has worked toward a simplified market structure and cut down the inventory costs for buyers of paper. While such activities are of direct benefit to the consumer, they cannot be classified as promotional, and aside from the scattered efforts mentioned above, there is nothing done in this field.

#### The National Paper Trade Association

The membership of this association is comprised of paper merchants. In the field of printing papers from eighty to ninety per cent of the dealers are represented. There is no current effort to increase markets.

A few years ago this group considered and discarded a plan which was designed to increase the use of paper through a stimulation of the use of printing. This was to be achieved by collective advertising in different publications, by issuing printed matter to its membership for redistribution, and by illustrating how blotters, bulletins, cards, time tables, etc. could be used for advertising.

The plan was vetoed by the membership, principally on three grounds. First, it was felt that the field was already well covered. Second, no one needed to be informed of the use of printing or paper. Third, original, creative ideas are the capital assets of those who possess the ingenuity necessary to conceive of them, and general dissemination of such information would destroy competitive advantages.

Inasmuch as the largest users of paper generally purchase directly from the manufacturer, it is apparent that the members of this association are very interested in the welfare of the smaller printer.

## THE PRINTING INDUSTRY

### Advertising Typographers of America

This is a small Association affiliated with the New York Employing Printers Association. It is comprised of typographers working in the advertising field and represents about eighty per cent of the total production. Cooperative advertising campaigns have been used to promote their special business. The Association feels that this collective advertising has been worth-while and apparently intends to continue it.

The Association has gone extensively into trade customs problems and also deals with the labor situation. It contributes to the Advertising Federation of America and sponsors a training course for salesmen.

### American Photo-Engravers Association

The interests of the American Photo-Engravers Association

naturally are centered in the field of letter press printing, and their activities, therefore, are designed to enlarge that field and protect it from inroads made by newer processes.

Several years ago the Association tried a collective advertising campaign. This was sponsored in several of the different trade magazines. It was subsequently discontinued as ineffective.

Recently, the association established a monthly publication, MORE BUSINESS, for the purposes of demonstrating the accomplishments of photo-engraving and letter press printing, and stimulating new business through creative ideas for presentation of copy, use of color, etc. A small amount of advertising appears in this publication, although the amount is limited. There is no central distribution; copies are sent upon request to the membership and others in the graphic arts industry at a price of fifteen cents. It is hoped that through this fee and through the small amount of advertising the publication will be virtually self-sustaining.

Approximately thirty-five thousand copies are presently distributed. It is hoped that this circulation will be increased to nearly one hundred thousand. If this distribution were obtained, the price of the publication could be considerably reduced.

There is no desire to become involved in controversies on the competitive merits of printing processes. The appeal of publication is of a dignified nature, attempting to build business by illus-



trating what can be accomplished rather than by disparagement of competition. Many letters of appreciation have been received from consumers, and there have been indications that specific jobs have resulted from it. More widespread support by the letter press industry and others interested in its welfare would unquestionably increase the effectiveness of the publication.

Through MORE BUSINESS, which is both creative and specific, the Association feels that it has hit upon the most effective means of stimulating markets. Collective advertising it has tried and discarded, and irrespective of the difficulties in administering a general marketing plan, it believes that any attempt to spread printing as such would necessarily be so broad that it would be ineffective.

The Association does no technical research as a group, nor does it engage in any sort of educational activities. It pursues the usual trade association functions, which are broadly indicated in the chart of this survey.

#### International Association of Electrotypers and Stereotypers

Electrotypers and commercial stereotypers are included in the membership of this Association. The Association has a publicity committee, and during the past year has sponsored a collective advertising program. Two page spreads have appeared in certain printing trade journals, and circulars have been prepared containing items of

interest to the printer and suggesting methods of selling. These have been distributed to the customers through the direct mail. Letters of appreciation have been received from printers, indicating that their interest has been aroused. It is difficult to trace tangible results, but the program seems to have been worth-while. The program will be reviewed at the annual convention in October.

The Association has an official monthly publication called THE ELECTROTYPERS BULLETIN. This is distributed without subscription charge to non-members as well as to members. It contains Association news and general news of the industry.

A collective research program is sponsored under the direction of a research committee. Formerly a fellowship was maintained at the Bureau of Standards. This has been discontinued, and a two year's program is now under way at Battelle Institute. It is hoped that this work will discover means of producing better and more efficient plates. Information is distributed to the membership through technical bulletins. Members have the privilege of presenting problems, but these are not allowed to interfere with the regular program.

There is no training program either for salesmen or for production men. The individual concerns have their own apprentice systems, which are required by the union set-up.

The Association is quite active in other respects, and the scope of its activities is roughly indicated on the general charts.

Lithographers National Association

The membership of this Association consists chiefly of the lithographers who work on paper. About sixty-five per cent of the production capacity of the industry is represented, although only twenty per cent of the companies using the process are members.

The Association was founded in 1883. During its long existence it has experimented with most of the various trade association functions. At one time a three year promotional program was sponsored. Feeling that no appreciable benefits were realized, the Association did not renew the program. It feels that there is at least one difficulty inherent in such work. There are many different ways in which printing can be used. A cooperative program must be a compromise; it cannot, for example, stress poster printing without being accused of partiality by those interested in booklets. The attack is so general, therefore, that it loses most of its effectiveness.

A broad program to stimulate all kinds of printing would magnify this difficulty, for at the slightest hint or suggestion of specific propaganda, considerable resentment would be stirred up between the different printing processes, papers, and media.

The Lithographic Technical Foundation is completely separate from the Association and handles all research and educational activities. The Foundation is described in the educational section of this survey.

The Association collects statistics, works on trade customs, standardization, cost accounting, and distributes information on important legislation. At one time it experimented with a cooperative buying plan but subsequently discontinued this activity.

#### National Association of Photo-Lithographers

This Association publishes a monthly magazine called THE PHOTO-LITHOGRAPHER. It contains paid advertising and is distributed to consumers as well as to the membership. It carries industry news, and attempts to acquaint its readers with recent trade developments. The normal circulation is three thousand copies per month. Two issues every year are devoted to a review of equipment; six thousand copies of these issues are distributed.

THE HANDBOOK OF PHOTO-LITHOGRAPHY was recently compiled by the Association. It demonstrates the accomplishments of the photo-lithographic process and indicates the various types of papers and colors which can be used. Over five thousand copies of the handbook have been distributed. Many customers have informed the Association that orders have been placed because of this booklet.

Last year the Association sponsored an intensive training program for salesmen. Lectures were given by members of the Association on sales principles and methods, costs and estimating, design and layout. The classes proved to be popular, and the program will undoubtedly

odly be continued.

There is no training program for operating men, although the annual meeting in September will consider the plausibility of entering this field. Equipment would be necessary for this work.

The Association does no technical research. It is active in the collection of statistics, the promulgation of trade customs, and in the other general association functions.

#### New York Employing Printers Association

The New York Employing Printers Association is a local division of the United Typothetae of America. It has several affiliated groups, among them the Advertising Typographers of America, which is also described in this survey.

One of the affiliated bodies, the Associated Printing Salesmen, runs a six unit course on sales methods and techniques, attempting to train men who will be of real service to the consumers.

The Association maintains a library of marketing specimens. This serves as a source of ideas, which the membership can call upon for the purpose of soliciting business. This is similar in its function to the central specimen file maintained by the United Typothetae of America in Washington.

The Association does no collective advertising and no market

research. It feels that the marketing efforts of the various trade associations in the graphic arts field are not as effective as a central attack might be. If there were a central research body gathering material, the different groups would be in a position to use it effectively.

#### United Typothetae of America

Established in 1887, the United Typothetae of America is an international association of master printers engaged in any or all of the various printing processes. Its activities are manifold, although in many respects they are not as extensively pursued as in former years.

A file of printed specimens is maintained. This includes numerous specimens of advertising copy which have been used in previous campaigns. These are classified according to industry or trade and are available on a loan basis to the membership. By this procedure it can be demonstrated to customers how others in their industry have used printing. It is believed that the specimen file has been a means of stimulating much new business.

A bimonthly bulletin is published. This contains articles on pertinent government legislation, technical developments, management, trade statistics, business trends, and market activities. It formerly included a marketing insert, but this has been discontinued.

A course in the selling of printing is given in a set of six

books published by the Association. Material is also furnished for discussion at the meetings of the various sales clubs scattered throughout the country. Apparently, however, these clubs have dwindled considerably, both in number and activities during the past few years.

There is no technical research. Before the depression an extensive educational program was sponsored. This has been drastically curtailed so that now the educational activities revolve principally around the library facilities and the printed specimen files. Text-books on sales, business management, and technical subjects are handled by the Association. Abstracts are compiled of important articles in the printing field, and every effort is made to keep the membership informed of new equipment, process developments, etc. A patent file is maintained, and searches are made upon request of members. Marketing counsel is furnished individual members - this in addition to the general information supplied from time to time in the bulletin.

Other activities include public relations, statistics, accounting, cost finding, production records, etc.

#### PUBLISHERS

##### American Newspaper Publishers Association

The various metropolitan newspapers throughout the country comprise the membership of this Association. It has many activities

and has established a separate department, called the Bureau of Advertising, which deals with the marketing problem.

The specific objective of the Bureau is to increase the amount of national advertising in the member newspapers. Many of its efforts are directed against competitive media, particularly the magazines and radio. It has a research staff, which studies market situations very carefully and analyzes specific industries. For example, one of the recent studies covered the oil industry. Geographical and seasonal volumes of business were analyzed and compared with the monthly advertising of the leading oil companies. As a result of this study, several large concerns were induced to increase their volume of advertising in order to obtain a better correlation with market fluctuations.

Another comprehensive study analyzed the coverage of newspapers in given localities and compared the effectiveness of advertising with the leading magazines in the same localities.

Monthly promotion studies are sent out to the membership in such form that they can be adapted to local conditions. For example, general information developed on the shoe trade can be used to encourage local department store advertising.

The Bureau deals only with the national advertising problems and does not involve itself in local situations. A national advertiser is one who advertises in more than three cities. The rates, of course, are different from the local advertising rates.



The Bureau is presently working on an institutional campaign. It is collecting copies of advertisements which have been used in campaigns and is summarizing their effectiveness. Statements are to be obtained from the companies sponsoring the campaigns as to the effectiveness and desirability of such a procedure. The results of this study will be sent to the membership of the Bureau and can be used by them to stimulate local industries to emulate these successful examples.

The Association also has a mechanical division. An annual conference is sponsored, at which there are papers and discussions on the various mechanical and technical problems of the industry. These are subsequently published in a bulletin, which also describes recent advancements in the field and gives reprints of articles published in other countries. The bulletin is sent to the membership only, although supply people may subscribe.

Until a short time ago, a research associate was maintained in the government laboratories in Washington. He worked on problems of general interest outlined by the Association. This arrangement has been discontinued, although a certain amount of investigation is carried on by the Association in New York.

A complete file is kept on equipment and process developments and may be referred to by members of the Association.

There are numerous other functions of the Association; for example, there is a union department which handles all union problems,

and an open shop department is maintained in Philadelphia to deal with that field. There is a law department in Washington to maintain close contact with problems in the legal field and public relations. Work is done on collections, credit, statistics, etc. The Association has done nothing in the accounting field, although it plans to begin this activity in the near future.

A joint committee has been established with the American Association of Advertising Agencies. Among other things it is working on the standardization of color of ink in newspapers, and it is attempting generally to improve advertising techniques.

#### Book Manufacturers Institute

The Book Manufacturers Institute is supported by most of the important plants engaged in the various phases of book manufacturing.

The Institute is actively concerned with the problem of developing markets. Its attention is drawn particularly to the southern states, where the number of books sold is very small. Many states have counties where no books are sold. The Institute is attempting to work out a plan for increasing these markets.

The Institute is sponsoring a Book Fair this year in conjunction with the New York Times and the Book Publishers Association. This will be similar to the annual fair sponsored in London by the Times, and after being exhibited in New York will be sent to different parts

of the country.

Two states have their own printing plants, and the Institute is attempting to eliminate these so that the business may be turned over to private plants.

The Institute collects statistics, establishes uniform trade practices and customs, watches national and state legislation, works on shipping problems, cost accounting, acts as a clearing house for all disputes between members or between members and customers, works on the standardization of paper, cloth, ink, etc., and has a research associate to advise the industry on technical problems and the development of new markets.

#### National Editorial Association

The membership of this Association is comprised of weekly and semi-weekly newspapers. Approximately one hundred fifty of the smaller daily non-metropolitan newspapers are also members. The total membership numbers approximately three thousand two hundred.

The Association has done nothing as a group to stimulate markets. It cooperates with the Home Economic Service Corporation of New York in the sponsorship of a motion picture cooking school. The Service Corporation conducts the program and contacts the participants. The Association supplies its members with information, which they can use to obtain advertising run in conjunction with the movies.

Before the depression the Association conducted a thorough analysis of market conditions and the general economic set-up of four different states. The material was distributed to advertising agencies and to newspapers in those localities, so that they might use it to obtain further business. Although the work was felt to be worth-while, it was discontinued during the depression.

The Association once had a "cooperative advertising department." Mats and cuts of the various manufacturers were distributed to the member newspapers, who could then prepare copy and lay out ideas to sell to local dealers. This was discontinued because of the large amount of detail involved.

The Association has a monthly publication called THE NATIONAL PUBLISHER. This has an advertising department, which discusses advertising methods and means of obtaining new business. It also contains analyses of different market areas. A monthly service letter is published.

The Association attempts to protect its members against the various fraudulent schemes that are constantly propounded. It tries to answer problems of all sorts, technical as well as otherwise, although no technical research is done. It has a cooperative engraving department, which is self-sustaining. A Washington office is maintained for the purpose of following closely all legislation affecting publications.

Accounting and cost finding systems have been established,

and statistics are gathered and published in the Association newspaper.

The Association cooperates with the schools and departments of journalism, having a special committee which is appointed for this purpose.

#### National Publishers Association

This Association is comprised of the publishers of periodicals having a national circulation. It was founded many years ago for the single purpose of achieving a unified system of postal rates. After banding together as a group for this specific purpose, it became necessary to delve into matters of copyrights, transportation, labor, legislative problems, etc.

The Association has done very little with advertising. Some time ago an organization was formed to handle the advertising of several large companies. This, however, was completely separate from the National Publishers Association. Some of the members have participated in the exhibits of the Direct Mail Association, but they have done this as individual concerns. There has been no combined effort to combat radio or newspaper advertising. The Association has never worked collectively on technical problems, methods of operation, or shop practices.

## THE INK INDUSTRY

### National Association of Printing Ink Makers

The Association does not engage in any promotional form of market stimulation. Recently it sponsored a collective advertising program. This involved a series of advertisements, the central theme of which was "Use Better Inks", and a series of articles which attempted to educate the consumer to buy on the basis of quality rather than price. The program was abandoned as ineffectual.

There is no central technical research. A group of the non-competitive members have banded together to study certain problems, but they are completely separate from the Association and represent only a section of the industry.

The Association has worked on standardization problems and has developed a nomenclature system and a series of testing procedures for raw materials. It has established a system of credit control, developed a thorough cost accounting system, and at one time sponsored a cooperative buying program, although this has been discontinued.

The Association originated a magazine called the AMERICAN INK MAKER. This is now an individual enterprise, although a publication committee appointed by the Association serves in an advisory capacity.

Statistics are collected, freight problems investigated, and

a cooperative procedure is followed on labor problems. Public relations and taxation problems are studied.

The ink bill only amounts to about three per cent of the total cost of an ordinary printing job. The comparative financial interest of ink producers is thus small compared to other participants. The use of printing has been widened by the improvement of colored inks. For example, the sale of paper cartons has been greatly increased because ink developments have permitted more attractive packing facilities. Generally speaking, the research of ink makers has not been accomplished for the purpose of widening the printing market so much as to meet the conditions that are presented by new presses, new papers, new factory room conditions, etc. The Association has never contacted the consumers of printing; their contacts have been with the consumers of ink, and it may be that stepping beyond the bounds of ordinary business relationship would incur the antagonism of the latter.

#### THE EQUIPMENT INDUSTRY

##### National Printing Equipment Association

This Association is comprised of the manufacturers of equipment used by the printing industry. It is a relatively new group, and aside from the considerable time and money spent in an attempt to formulate a plan for general industry cooperation, it presently does little as an association. There is no publication, nor is there centralized

research. Generous support has been given to certain educational ventures, but this seems to have been more in response to specific situations than as a result of general policy.

Limited statistics are collected and general information is distributed to the members in the form of reprints and specific news letters.

While the printing equipment group has done nothing in the fields of technical or market research, the fact that it has spent considerable money over the past two years to study the situation, indicates that as a group it is perhaps as keenly aware of the need for general cooperative effort as any other group in the graphic arts industry.

#### Newspaper Printing Press Builders Association

This is a small association comprised of the manufacturers of newspaper printing presses and stereotype machinery. It does no collective advertising. A few years ago a market survey was made. This was followed by direct mail advertising and by personal contact in an effort to stimulate the general market situation. The Association was not encouraged by the results of this campaign and has done nothing along these lines since.

The Association pursues the regular functions of accounting, standardization, statistics, etc., but is too small to attempt anything



in the way of general education or research.

## ADVERTISING GROUPS

### American Association of Advertising Agencies

The membership of this Association is composed of the various advertising agencies. Its purposes are to promote agency business, further standardization, and generally improve advertising and agency practices.

The Association has considered the possibility of cooperative effort to increase the amount of advertising but has not hit upon an advisable method of procedure. It has contemplated the advisability of studying the market structure of various industries in order to obtain data which can be used in soliciting advertising business. Nothing has been done along these lines, however. Perhaps the commission system is a greater spur toward the increase of advertising than any general program or propaganda.

To advertise advertising may not be any wiser from a psychological standpoint than to attempt to sell selling. Tact is required, and just as sales efforts become repugnant when they are made too obvious so is there the possibility that over emphasis of advertising will have a negative effect.

There seems to be a growing resentment on the part of various

groups toward widely advertised products. Proposed legislation, taxation of advertising, consumer clubs, consumer research and propaganda are indications of this spirit. The present volume of advertising warrants consideration, perhaps even more urgently than any plan to increase that volume. Investigations should be made and data gathered so that the ethics and reliability of advertising can be evaluated and the basis laid for a general philosophy of the proper function of advertising in the social and economic system. This should be of general interest to all concerned in printing. Perhaps concerted effort should deal with the function of advertising and the matter of increased volume be left to the selfish motives of individuals who will profit by new business.

#### Advertising Federation of America

The membership of the Federation includes local advertising clubs, organized national groups representing special interests in advertising, and "sustaining members". It serves all media as well as sellers, users, and creators of advertising and thus may be regarded as a sort of focal point of the advertising world.

Organized in 1905, the purposes of the Federation are to promote the best interests of advertising in general by increasing public confidence and faith in advertising and by developing a better understanding of its economic values and functions. Much has been accomplished

toward raising the ethical level of advertising by discouraging fraudulent and misleading campaigns.

In 1927 the Federation established a Bureau of Research and Education. The Bureau is engaged in active studies of advertising problems, analyzing economic and social values, and presenting the comparative effectiveness of different advertising policies. Reports are published, speeches given, and articles written on the function and importance of advertising in our economic system from the standpoints of both consumer and producer. Close contact is maintained with the various universities and colleges having courses in marketing and advertising. Exhibits are arranged, and the Bureau cooperates with the educational committees of affiliated advertising clubs.

Because of the variety of its membership, the Federation naturally cannot stress printed advertising as such. It must emphasize advertising as a function. There is no doubt, however, that its activities have a healthy influence upon the printed advertising field, and work which raises the level and intelligence of the practice, as well as justifies it as a social function, will inevitably tend to increase the volume.

Among other things, the Federation is sponsoring a series of advertisements which outline the social values of advertising.

#### Direct Mail Advertisers Association

Members of this Association include printers, suppliers of

paper and equipment, letter shops, large users of direct mail advertising, and others interested in that medium. The membership numbers nearly six hundred.

The Association sponsors traveling exhibits, which are both educational and commercial in their aspect. These have attracted widespread interest and are believed to have stimulated new advertising. The educational phase of the exhibits consists of displays of successful campaigns, informative data on distribution, business stimulation, and the correlation of direct mail advertising with radio and other media. The commercial phase of the exhibits consists of special displays paid for by individual concerns to sponsor their own products.

A research library is maintained under the direction of a permanent librarian. Specimens of direct mail campaigns and articles on pertinent subjects are collected. The facilities are available to the membership.

#### Outdoor Advertising Association of America

The owners and operators of outdoor advertising plants form the membership of this Association. Formerly it was quite active in the marketing field. A few years ago Outdoor Advertising Incorporated, a sales promotion, non-profit corporation was formed. Since the membership of the Corporation is essentially the same as that of the Association, the latter no longer deals with sales and marketing activities.

The work of the Association is chiefly administrative in character. It deals with industry relationships, standardization of business procedures, follows legislative action, and gives statistical service. A monthly newspaper is published; it reports industry news and sometimes describes case histories of campaigns which have resulted in more business. The circulation is limited to the membership and allied organizations (suppliers or recommended agencies). There is no central educational system, nor is there technical research. The Association is working on a textbook for schools and colleges; it will present the economic functions of outdoor advertising and will describe its place and its accomplishments. An extensive field service is maintained, the field men acting as councillors to the members, apprising them of the latest rules and regulations, helping with local sales problems, and recommending improvements wherever possible.

There are approximately one thousand twenty members located in seventeen thousand cities and towns.

#### Outdoor Advertising Incorporated

The chief objective of the corporation is the development of a wider, more intelligent, and more profitable use of outdoor advertising. Approximately eighty-five per cent of the plant owners are members.

The job of the corporation is one of creative selling, of acquainting industry generally with the use of outdoor advertising. Thorough studies are made of the clients' businesses to discover where

the medium can be used. An art department is maintained. Estimates as to rates and allotment are given, although specific recommendation as to distribution of business or the awarding of printing jobs is avoided. There is a censorship committee to pass upon the acceptability of certain forms of advertising.

\* \* \* \* \*

There are several other associations which are quite active. Some of these concern themselves with marketing problems; for example, the American Book Sellers Association, the National Association of Book Publishers, and the National Stationers Association. There was not sufficient time, however, to interview all groups. Other associations on the list are doing laudable work, but the ramifications of their activities do not seem to bring them within the bounds of this study.

## EDUCATION AND SCIENTIFIC INSTITUTIONS

### Education

Like "research", "education" is an ambiguous term lending itself to many different interpretations.

The connotation of the word, insofar as it is used in this report, can be limited to include only those educational efforts which are immediately concerned with the artistic, sales, technical, or scientific principles of the graphic arts. Embraced within this field are not only the academic efforts of the organized educational system which stamps its results with diplomas or degrees but also the non-academic efforts of associations outside of the pale of formal educational institutions.

In a larger sense, all forms of education have a significant impact upon the graphic arts industry. The literacy of the people and the extent of their mental curiosity will naturally determine the amount of their reading. This is especially true in the non-commercial fields of printing. The survey, however, is concerned chiefly with commercial printing, a field that is more tangible and more likely to be influenced by promotional effort of the sort envisaged by the PRINTING RESEARCH FOUNDATION.

Even this limited definition of education presents a problem which is difficult to analyze. Keeping in mind the objective of an

increased market for printing, one is again confronted with the argument that simple promotion is only one of the means of achieving this objective. Is it possible to say, for example, that the training of salesmen or the inoculation of students with a general knowledge of printing uses has a more vital affect upon the market than an education system which seeks to discover fundamental principles so that the art may be improved, or one which endeavors to train men for more efficient production?

If the survey is to be a significant one, it must describe all educational activities in the graphic arts field, avoiding any argument as to relative effect upon use.

In addition to knowing the purposes of a particular educational effort, that is, whether it is to train salesmen, or to give a vocational background for a production job, or to develop a scientific type of man power, or simply to give a rudimentary acquaintance with printing, it is necessary to discover the basis on which students are selected, the background which they must possess, the nativity of their minds, the qualifications of the teaching staff, the extent of physical equipment and library facilities, the length of the course and its ramifications, the correlation with original research, the method of finance, and the contact with industry.



## THE PRINTING INDUSTRY

Education and training in the printing field are chiefly carried on by institutions functioning below the college level. There are between three and four thousand high schools and vocational schools giving courses in printing. The Graphic Arts Education Guild recently published an incomplete directory of these schools. Generally speaking, the purposes and achievements of the high school and the vocational school are quite different.

### Junior High Schools and High Schools

There are approximately fifteen of these to each trade school or vocational school. The high schools obtain their teaching staffs principally from state teaching institutions. Their equipment is purchased, and they are restricted in their printing activities to the various jobs within the schools, not being allowed to do outside service.

It is felt that the accomplishments of these schools are two-fold; first, through their printing classes the students are acquainted in a more dynamic fashion with their other subjects, English, spelling, languages, art, mathematics, etc. Habits of neatness, observation, and accuracy are acquired, and creative work is inspired. The courses, therefore, have a general educational value.

Second, future consumers of printing are being trained.

Through this elementary contact with the art, they become more familiar with its nomenclature, with the artistic values that can be achieved, and the standards of workmanship to be expected. With this background, it is reasonable to expect that they will use printing more intelligently and more extensively, thereby spurring the industry to higher and more artistic standards of production.

#### Vocational or Trade Schools

The teaching staffs of the trade schools are drawn principally from the industry, although whenever possible, industrial experience is supplemented by educational background. The programs are formulated for the specific purpose of training man power for the printing industry. The more successful schools have no difficulty in placing their men; in fact, the man power requirements of the industry are believed to be approximately three times the output of the schools.

No research is done since the schools do not possess the facilities, nor do the teachers or students have sufficient background for such work.

\* \* \* \* \*

The Graphic Arts Education Guild is an organization set up for the purpose of promoting "education for and through the graphic arts industries in cooperation with organized education." It acts as a coordinating body for educational activities carried on by industry

organization and cooperates with the different schools giving instruction in the graphic arts. It works with the national, state, and regional educational agencies, promotes an annual Printing Education Week, sponsors an annual conference on graphic arts education, and attempts to gather information and material which will be of aid to the instructors, and publishes a bulletin called GRAPHIC ARTS EDUCATION.

Nominal membership fees are charged, the real financial support coming from industry patrons. More money is needed if the work is to increase in effectiveness.

The Guild is facing a very important problem. It is a real task to discover instructors sufficiently trained in both educational methods and industry processes to be completely effective. The instructors must keep abreast of recent developments in the industry in order that their courses may be of current value. They should have opportunities to exchange ideas on curriculum, to trade their experiences and assure themselves that they are following the same general principles. The success of the different schools is completely dependent upon the level of instruction. Apparently there is much to be accomplished in this field.

#### Instruction at the College Level

Except for the courses offered at Carnegie, there is virtually no training at the college level.

The Department of Printing at Carnegie was established in 1914. The first degrees were awarded in 1918. The school is training men for the graphic arts industry, giving them a knowledge of the procedures used in printing, the economics and psychology involved, and a rudimentary college acquaintance with the liberal arts subjects. In other words, it provides a limited college education along with specific training in the printing field, the division being about fifty-fifty. The same entrance requirements are established for the printing department as for the regular engineering departments.

The school does not pretend to train craftsmen who are prepared to step immediately into production work. It attempts to instill a broad appreciation of the techniques of the industry supplemented by a general training in business procedures, especially as they apply to the graphic arts industry. There is no difficulty in placing the men.

Although generous support was previously given by United Typothetae of America, the present income of the department comes entirely from the general endowment of the Carnegie Institute of Technology. The staff is comprised of four full time instructors; part time instruction is given in press work, chemistry for printers, and accounting. Several of the courses are a part of the curriculum of the regular service departments of the engineering school.

No advanced degrees are awarded. Additional facilities for research and additional income would be necessary for this purpose. The department does no research, lacking the necessary funds for staff

fellowships. The courses cover the applications of printing rather than the fundamental scientific principles behind the art. Sound instruction in the latter is, of course, dependent upon a sound research program.

A summer course is offered to teachers of printing. Work is given in composition, layout, design, cost finding, estimating, press work, etc. Academic credit, which can be applied toward a degree in industrial education, is received for this summer work.

Last year a night school was conducted. The program was essentially vocational. Approximately one hundred enrolled, paying a tuitional fee of six dollars per instruction hour per year. The prerequisite for admission was a high school education or its equivalent.

#### Lithographic Technical Foundation, Inc.

The Lithographic Foundation was established in 1926. It has an endowment of approximately seven hundred fifty thousand dollars and uses the income from this to finance its educational and research departments. The Foundation is completely separate from the Lithographers National Association, which deals with administrative matters.

The educational and research departments of the Foundation are separately administered. The former is located in New York City. By working through the various high schools and vocational schools, it

is attempting to establish a training program for workmen in the lithograph field. Text material for use in this field is being gathered. Activities have been concentrated in New York, although work has started in several other large cities.

The research department has a working arrangement with the University of Cincinnati. The latter supplies space, standard equipment, and certain other facilities. The staff of the University is available for consulting purposes. The department has no training program, although graduate students of the University may receive credit toward an advanced degree for research on chemical engineering problems in the Foundation's laboratories. About a dozen students have used this privilege during the past eleven years.

The Foundation has a staff of four, including a librarian who prepares abstracts of important articles every month and submits them to three of the trade journals for publication. Since 1930 a research associate has been maintained in the laboratories of the Bureau of Standards for the purpose of working on paper problems. This procedure is followed because the Foundation itself does not have the necessary equipment or facilities for work on paper.

The research program, which is reviewed annually, is under the supervision of the Committee on Research. The program is kept sufficiently broad to be of benefit to the industry generally. Results are distributed freely to the membership of the Foundation, and in most instances, to non-members as well. No problems are studied for the

specific benefit of individual concerns.

Last year an evening course in lithographic technology was given by two members of the staff. Principal attendance was by men working in the industry within Cincinnati. A small tuition fee was charged and prerequisites of high school chemistry and physics were established. These were not strictly adhered to. A certificate was awarded for passing work, although no formal academic credit was rendered. The night school will be repeated this year.

#### THE PAPER INDUSTRY

One does not find the extensive secondary school and vocational school training in paper that one finds in printing. The latter is unique in the close relationship it has established with the educational system. The nature of the paper industry is such that it does not lend itself any more readily to such a program than the steel industry, the automobile industry, or the cement industry. Its equipment is cumbersome and expensive, its processes too intricate, and its relationship to the aesthetic too remote for universal instruction.

There is a limited amount of vocational instruction in paper, and this is confined to the districts where paper manufacturing is a principal industry. The educational committee of the Technical Association of the Pulp and Paper Industry has edited a series of textbooks and

arranged a correspondence school course with some success.

One must turn to the colleges and graduate institutions, however, to discover the educational facilities for the pulp and paper industry. Here the industry is singularly fortunate. The New York State College of Forestry at Syracuse University has a Department of Pulp and Paper Manufacture. A four year course leading to a Bachelor of Science degree is offered. Graduate work, leading to a Master of Science may also be pursued in this field. The college is a state institution. There is little research accomplished. The school is well attended and has been quite successful in placing its graduates.

The University of Maine has a Pulp and Paper Department giving a four year course, which leads to a Bachelor of Science degree in Pulp and Paper Technology. Entrance requirements are graduation from high school, or its equivalent. Summer courses are also offered. Little is done in research.

Massachusetts Institute of Technology does not offer a course in pulp and paper, but it has an extension program which provides training in the engineering phases of the industry. The University of Washington, Seattle, also offers a certain amount of instruction in pulp and paper.



The Institute of Paper Chemistry

The Institute of Paper Chemistry is a non-profit corporation affiliated with Lawrence College at Appleton, Wisconsin. It was established by the paper manufacturers of Wisconsin approximately seven years ago. The growth has been rapid, and it has become thoroughly national in its scope. The membership includes fifty-six different paper concerns operating one hundred sixty pulp and paper mills in twenty-six different states.

The objectives of the Institute are three-fold. First of all, it is a graduate school offering degrees of Master of Science and Doctor of Philosophy. Entering students must have graduated from universities or colleges with a required amount of chemistry, physics, mathematics, and German, and with a record that places them in the upper tenth of their class. The current student body numbers forty-five and represents a rigid selection from approximately five hundred different applicants. Graduates from the Institute are immediately placed in the industry; in fact, there are approximately three jobs on the average to every graduate. The Institute is, therefore, a source of highly trained man power for the pulp and paper industry.

The second objective of the Institute is that of research. The staff, which numbers seventy-four, and the students are constantly working on the broad fundamental problems of the industry. The supporting pulp and paper mills have the privilege of submitting specific

problems for study at the Institute on a confidential basis. Only the staff works on such problems. Allied industry may also bring projects for study on the same basis.

The third objective of the Institute is to serve as a clearing house for all written and accumulated material on the paper industry and allied subjects. To this end it has collected a library of over five thousand volumes. It also prepares monthly abstracts of important articles appearing in over one hundred forty publications published in the twelve leading paper manufacturing countries.

The growth of the Institute has been rapid. It now occupies three buildings and is extensively equipped with both semi-commercial and research facilities. Its annual budget totals over a quarter of a million dollars, and its capital assets are valued at nearly a million dollars.

The Institute is unique in this country. Here for the first time, a major industry has its own organization working at a high level in the educational and research fields. A number of important technical developments have been achieved at the Institute, and its rapid growth is the best indication of the need for such work.

It is the feeling of the Institute that fundamental and applied research must necessarily accompany a successful training program. In this way the staff not only keeps abreast of current developments but actually leads. It is manifest that under such conditions the value of

the institution is greatly enhanced, both to the industry it serves and the men it trains. By restricting its student body to men who have already graduated from college, it succeeds in collecting a more mature, a more select group.

Through the Institute, the various paper mills have made it possible to assemble equipment and staff, which no one of them could afford singly. Under the plan of operation, they may use these facilities for their own problems. The economy and efficiency of such a procedure are obvious.

The Institute of Paper Chemistry is completely divorced from all association activities, thereby avoiding the political intricacies often involved in such work.

CRAFT ASSOCIATIONS

Graphic Arts Research Bureau

The Graphic Arts Research Bureau is an organization to promote research in the printing and allied industries. It works in close cooperation with the American Society of Mechanical Engineers. It encourages the collection and exchange of technical and research information and sponsors an annual meeting for the presentation and discussion of subjects in the graphic arts or related fields. The first meeting was held at Cincinnati in 1935, the second at Washington in May, 1936. One of the original purposes of the Bureau was to establish and direct a Graphic Arts Research Foundation. No definite progress has been made toward this objective.

Nominal membership fees are charged; anyone having "an active interest in graphic arts" is eligible for membership. In addition to individual members, there are corporate members, association members, and research fellows (those who have made technical contributions to the advancement of the industry).

The activities of the Bureau have centered principally around the two annual meetings it has held; aside from these there are few indications of vitality.

International Printing House Craftsmen

The International Printing House Craftsmen is an organization of production men in the printing industry. It has about five thousand members paying annual dues of two dollars each. There are no salaried officers or employees. National meetings are held annually. A monthly magazine having a circulation of five thousand five hundred copies is published. This carries no advertising and contains technical papers, articles on recent developments, and local club news. Technical exhibits and displays are sponsored. These are routed through the local clubs.

The Craftsmen appointed a Research Commission at their annual meeting in St. Paul this August. The Commission is charged with the responsibility of drawing up a program for technical research. Although definite plans have not been formulated, the Commission believes that it will be necessary to have ten thousand dollars for the first year. This will be spent principally for organization.

The Commission was created because of the Craftsmen's growing conviction that there should be a central research program. Since they have nothing to buy or sell and therefore no ulterior motives, the Craftsmen feel they are the group to conduct such a program. The specific manner in which the research will be accomplished, the method of financing, the amount of money necessary, etc., have all to be determined.

Apparently all information will be circulated freely through the Craftsmen's magazine or in separate reports. Fellowships will be

established at various institutions to study fundamental problems. Some of the work on specific problems can be done at the government laboratories. It is not contemplated that the Commission will hire a staff of its own.

The Commission is preparing a prospectus of the plan. When this is completed, it will attempt to raise money necessary to finance the movement.

#### Technical Association of the Pulp and Paper Industry

The Technical Association of the Pulp and Paper Industry (T.A.P.P.I.) was organized in 1915. It is an international craft association set up for the purposes of furthering science in the pulp and paper industry, promoting education, investigation, research, and the interchange of ideas among its membership, arranging the collection and dissemination of information, and the presentation, discussion, and publication of papers providing technical facts and standards, and promoting the professional, social, and economic welfare of its members.

The National organization holds two regular meetings every year; local sections usually meet monthly. Papers are published in a section of a weekly trade journal. A yearly publication contains the papers and transactions of the two national meetings. Numerous special reports have been published on nearly every technical aspect of the industry. The Association has made many contributions to the standardiza-

tion of testing procedures. A large and active committee structure is constantly at work under the Divisions of Management, Engineering, Operating, Raw Materials, Research and Development, Converting and Consuming, Testing, and Miscellaneous. Textbooks and correspondence courses have been prepared; these are periodically revised. Special research projects are supported at different scientific institutions.

In general, the Association has led an active and constructive existence and has done much to further science in the industry.

The American Pulp and Paper Mill Superintendents Association

There is a second craft association in the paper industry called The American Pulp and Paper Mill Superintendents Association. Superintendents and plant managers are eligible for membership. An annual meeting is held, at which there are papers and discussions on mutual problems. These are published in a trade magazine, which is selected as the official news organ. Local sections of the Association meet as frequently as once a month.

### CONCLUSION

While a thorough survey of the situation would take considerably longer than the short time spent in gathering this material, there is sufficient information to arrive at a few general conclusions.\*

1. The paper and ink industries, further removed from the ultimate consumer than the printer, are doing nothing specifically designed to stimulate the use of printing.
2. The printing groups have attempted to stimulate printing in varying degree and with varying success. Collective advertising has been tried in most cases. Some have judged it worth-while, but the preponderance of opinion seems to indicate that this procedure is not particularly effective. Outstanding in their results are the publication MORE BUSINESS (Photo-Engravers) and the HANDBOOK OF PHOTO-LITHOGRAPHY (Photo-Lithographers). These, of course, should not be classified as collective advertising.
3. The publishers associations vary in their treatment of marketing problems. Unquestionably, the most comprehensive program is followed by the American Newspaper Publishers

\*It must be remembered that these conclusions refer to group action and not to corporate activities. Furthermore, they reflect the thoughts of the various groups interviewed and are not necessarily the opinions of the writer.



Association in its Bureau of Advertising. In fact, the Bureau works more intensively with the problem of markets and advertising than any group covered in this survey, although its principal concern is the welfare of the one medium, national newspaper advertising.

4. The justification of advertising as a social and economic function is considered just as important to some groups as any movement to increase the present volume.
5. Outside of the specific endeavors of the Lithographic Foundation, there is virtually no collective research, either fundamental or applied, in the printing field. The paper industry, on the other hand, is extremely active in this respect.
6. There is need for further correlation of the high school and vocational school courses in printing. The machinery for accomplishing this has been evolved; money is necessary for more effective work.
7. The paper industry is well provided with educational facilities for the training of mature, scientific manpower. The printing industry has only one institution working at the college level. Its courses are of an applied nature, not fundamental, and there is no accompanying research program.

8. Both the paper and printing industries have well organized craft associations. The activities in the former industry are more extensive.
9. There is a certain amount of apprehension for any plan which envisages a general promotional attack. The interests are so varied, the spirit of competition often so intense, that a broad approach tends to become too much of a compromise to be effective.

## APPENDIX

### Procedure for Gathering Data

The following procedure was followed in gathering the material for this survey.

The National Printing Equipment Association compiled a list of approximately seventy associations, which were believed to be affiliated in some manner with the graphic arts industry. A list of these associations is appended.

A general letter was then compiled and mailed to the associations on the list. It was thought that this letter would achieve three purposes: First, it would indicate which associations were actively engaged in work of interest to the survey. Second, it would eliminate the necessity of personal contact with a number of the associations and simplify the gathering of material. Third, it would pave the way for interviews with representatives of the associations.

Approximately forty per cent of the associations replied to this first circular letter. Twelve of these indicated that they were no longer active. A list of the associations which replied is appended, as well as a list of the inactive groups.

A second follow-up letter, mailed approximately three weeks later, brought only three replies.

It will be seen that the list of associations does not include advertising groups. Since the market research plan envisaged by the association is closely related to the advertising field, it was thought advisable to interview several of these groups. In addition, educational and research facilities were given some attention.

A list is also appended of the associations and institutions personally interviewed.

NATIONAL PRINTING EQUIPMENT  
ASSOCIATION, INC.

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38 Park Row  
New York, N. Y.

August 6, 1936

We are writing to you as a representative of an association which we feel to be interested in the welfare of the Graphic Arts Industry.

During the past year the National Printing Equipment Ass'n., recognizing that the prosperity of its own members is inextricably linked with the prosperity of the printing trade in general, expended a considerable sum to assemble a report which analyzed the recent history of that trade and the allied industries of ink and paper manufacturers. Out of this report grew the hope that a plan could be evolved which would benefit all those in the Graphic Arts Industry and also those who serve that great industry.

A short while ago, a meeting was held between members of our Association and representatives of the ink and paper industries. Before proceeding further, it was felt that a comprehensive survey should be made of all associations and institutions interested in the welfare of the printing industry in order that the joint committee appointed at that meeting might avoid duplication of efforts already being made by groups interested in the same purposes and in order to determine whether in certain instances correlation of mutual activities might be more effective than independent effort.

In brief, the Committee is attempting to discover what your association and certain others are doing that is of interest or of ultimate benefit to the printing industry. Since a report must be rendered in September only a month can be allotted to this survey and the Institute of Paper Chemistry in Appleton, Wisconsin, has loaned to us the services of its asst. executive secretary Mr. John Strange for this period.

We would appreciate an early reply from you indicating the scope of activities of your association, describing not only regular functions of statistics, trade customs and practices, etc., but any activities you may pursue in the way of research, marketing, publications, etc.

On the basis of answers received from the various associations Mr. Strange will personally interview the different groups so that ma-

2. (Form 1)

August 6, 1936

terial may be gathered which will be of real aid to the Committee.

May we enlist your cooperation in this work?

Yours very truly,  
National Printing Equipment Association, Inc.

By

James E. Bennet  
Secretary

ASSOCIATIONS AFFILIATED WITH THE GRAPHIC ARTS

Advertisers National Association 330 West 42nd Street, New York, New York	Paul B. West, Pres.
Advertising Typographers of America 461 Eighth Avenue, New York, New York	A. Abraham
American Association of Law Book Publishers 109 State Street, New York, N. Y. c/o Lawyers Cooperative Publishers, Rochester, N.Y.	W. White
American Booksellers Association 35 East 20th Street, New York, New York	F. L. Nagel
American Dry Mat Manufacturers Association 342 Madison Avenue, New York, New York	A. B. Bradie
American Institute of Bank and Commercial Stationery 1119 Tower Building, Washington, D.C.	C. A. Parker
American Newspaper Publishers Association 370 Lexington Avenue, New York, New York	L. B. Palmer
American Paper and Pulp Association 122 East 42nd Street, New York, New York	C. W. Boyce
American Photo Engravers Association 166 West Van Buren Street, Chicago, Illinois	L. Flader
Association of Bank Note Companies 1427 Eye Street, Washington, D. C.	Ferry and Dawson
Association of Blotting Paper Manufacturers 2 Drummond Avenue, Baltimore, Maryland	D. A. Smith
Association of Producers of Church Envelope Systems 19 West 44th Street, New York, New York	I. W. McLean
Association of Mounters and Finishers 19 West 44th Street, New York, New York	W. N. Guthrie
Binders Board Manufacturers Association 122 East 42nd Street, New York, New York	C. L. Lloyd
Bogus Wrapping and Packing Association 608 South Dearborn Street, Chicago, Illinois	G. Whiting
Book Manufacturers Institute 100 East 42nd Street, New York, New York	Judge Tiffany

Acknowledgment of first circular letter:-

Advertising Typographers of America - Albert Abrahams  
American Association of Law Book Publishers - R. W. White  
American Booksellers Association - Robert Coles  
American Paper and Pulp Association - C. W. Boyce  
Association of Bank Note Companies - A. H. Ferry  
Association of Church Envelope Systems - I. W. McLean  
Association of Mounters and Finishers - W. N. Guthrie  
Association of Newsprint Manufacturers of the United States - R. S. Kellogg  
Book Manufacturer's Institute, Inc. - J. R. Tiffany  
Book Paper Manufacturers Association - R. S. Berry  
Bogus Wrapping and Packing Association - Grafton Whiting  
Groundwood Paper Manufacturers Association - R. E. Canfield  
International Association of Electrotypers and Stereotypers - N. Gross  
Kraft Paper Association - S. M. Hudson  
Label Manufacturers National Association - Chas. R. Cosby  
Map Publishers Association - A. J. Nystrom  
Medical and Allied Book Publishers Council - H. G. White  
National Association of Book Publishers - Marjorie Griesser  
National Association of Photo Lithographers - W. E. Soderstrom  
National Gravure Printers Association - Chas. Oliff  
National Paper Trade Association - A. H. Chamberlain  
National Publishers Association, Inc. - Geo. C. Lucas  
National Stationer's Association - Chas. P. Garvin  
National Textbook Publishers Council - Geo. T. Buck  
Sales Book Manufacturers Association - O. L. Moore  
United Typothetae of America - Elmer J. Koch  
Writing Paper Manufacturers Association - E. H. Naylor

Inactive Associations

American Institute of Bank and Commercial Stationery\*  
Association of Blotting Paper Manufacturers\*  
Association of Church Envelope Systems  
Association of Mounters and Finishers\*  
Association of Newsprint Manufacturers of the United States  
Bogus Wrapping and Packing Association\*  
Map Publishers Association of the United States\*  
Medical and Allied Book Publishers Council\*  
National Textbook Publishers Council\*  
Sales Book Manufacturers Association\*  
Standardized Stationery and Business Forms Institute\*

\*No longer in existence.



NATIONAL PRINTING EQUIPMENT  
ASSOCIATION, INC.

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38 Park Row  
New York, N. Y.  
August 18th, 1936.

On August 6th 1936 we wrote you a letter asking what your Association is doing that is of interest or ultimate benefit to the printing industry.

This same letter was mailed to seventy different associations. Thus far we have had nearly thirty replies.

The specific purpose of this survey is to discover what is being done to spread the use of printing. Is your Association engaged in any activities which you believe will result in an increased market for printing of any sort?

We are anxious to make this survey truly representative of the activities in this field and would appreciate very much a reply from your group indicating what, if anything, you are doing along this line?

Thanking you in advance for your assistance in making this a worthwhile investigation, we remain,

Yours very truly,  
NATIONAL PRINTING EQUIPMENT ASS'N. INC.

By

James E. Bennet  
Secretary

JS/AHR

MAILING LIST FOR SECOND CIRCULAR LETTER

American Association of Law Book Publishers  
Engraved Stationery Manufacturers Association  
Envelope Machine Manufacturers Association  
Envelope Manufacturers Association of America  
International Trade Composition Association  
Lithographic Allied Trade Service Association  
Loose Leaf and Blank Book Manufacturers Association  
Master Engravers Guild  
Mechanical Press Builders Association  
National Law Printers Institute  
National Playing Card Association  
National Stationers Association  
Outdoor Advertising Association of America  
Poster Printers Association  
Print Cutting Jobbers Association  
Pulp and Paper Machinery Association  
Sample Card Manufacturers Association  
Standardized Stationery and Business Forms Institute  
Trade Binding and Paper Ruling Institute

Acknowledgment of second circular letter:-

Envelope Machine Manufacturers Association - George J. Earl, Jr.  
International Trade Composition Association - Wm. E. Lickfield  
Standardized Stationery and Business Forms Institute - E. C. Kaeser